

To: Interested Parties
Cc: American Society for the Prevention of Cruelty to Animals
From: Bob Meadow and Joshua Ulibarri, Lake Research Partners
Re: Results from a Recent Survey of American Consumersⁱ
Date: June 29, 2016

Lake Research Partners recently designed and completed an online survey of 1,000 American adult consumers regarding labeling of meat, eggs, and dairy products and the treatment of animals raised for food. The survey reveals that consumers are increasingly concerned about how these animals are raised, saying that they pay more attention to labels related to animal treatment than they did five years ago. While they are paying attention to labels, there are widespread misconceptions regarding the treatment of animals raised for food and exactly what labels mean. Once they are informed that there is little to no oversight of how animals are treated, consumers are very concerned, and they think that there should be an objective third party responsible for a certification process to verify that animals raised for food have been treated humanely. Additionally, consumers are interested in having more welfare-certified products at their stores, would alter their shopping behavior to have greater choice in products that meet a higher standard of animal welfare, and they are willing to pay more for these products. This brief memo covers some of the major findings on consumer attitudes towards labels, certifications, and animal welfare.

Here are the major findings:

1. **American consumers are overwhelmingly concerned about the welfare of farm animals.** More than three in four (77%) consumers say that they are concerned about the welfare of animals that are raised for human food.
2. **A large majority of American consumers pay attention to food labels that speak to how animals were raised, and interest in food labels is on the rise.** More than two-thirds (69%) of consumers pay some or a lot of attention to food labels regarding how the animal was raised. People's concern about how animals are raised has increased over time, as 74% of consumers say they are paying more attention to the labels that pertain to how an animal was raised than they were five years ago.
3. **Of the American consumers who are *not* paying attention to labels indicating how animals were raised, the largest percentage are primarily just not sure what labels to look for (28%).** Some also cite cost (too expensive – 22%) and not associating meat, eggs, or dairy products with the animals from which they come (22%) as reasons they do not pay much attention to labels.
4. **Consumers are confused by what food labels mean when it comes to the treatment of animals raised for food.** The survey tested whether or not consumers thought a list of statements regarding the meaning of food labels were accurate or not. Pluralities judged these statements to be true, when in fact, they are not. In addition to those who inaccurately identified false statements, many reported that they were not sure what was accurate (range of 10% to 16% of respondents were unsure, depending on the topic).

Lake Research Partners
1101 17th St. NW,
Suite 301
Washington, DC 20036

Tel:202.776.9066
Fax:202.776.9074

Partners
Celinda Lake
Alysia Snell
David Mermin
Dr. Robert G. Meadow
Daniel Gotoff
Joshua Ulibarri

Assumption	% Who Believe Accurate	Reality
The words "free range" on meat, eggs, and dairy products ensure that the animal spent most of its time in a pasture.	65%	There is no legal definition of "free range" claims on pork, beef or dairy products and farms do not need to demonstrate that animals had access to the outdoors. On poultry products, birds must have access to the outdoors but the size, duration and quality of space is not defined.
The words "cage free" on a package of eggs, chicken, turkey, or other type of meat indicate that the animal had outdoor access.	63%	Chickens and turkeys raised for meat are confined in giant, indoor warehouses, not in cages, so the term "cage free" on meat is meaningless. On eggs, it indicates that hens were not raised in cages, but does not mean that they had outdoor access.
If meat, eggs, and dairy products have the label "humane," it means the animal had a better than average quality of life on the farm	60%	There is no legal definition for "humane" on a food package, meaning that producers may largely raise animals in any way they see fit.
The words "antibiotic free" on a package of meat, eggs, or dairy products indicate that the animal had a better than average quality of life on the farm.	47%	Lack of antibiotic use on a farm is only an indicator of a farm's drug regimen: it is not a guarantee of better welfare.
The words "hormone free" on meat, eggs, and dairy products indicate that the animal had a better than average quality of life on the farm.	47%	Hormones are prohibited for use on chickens, turkeys and pigs so this label is meaningless on products from those species.
The word "natural" on a package of meat, eggs, or dairy products indicates that the animal had a better than average quality of life on the farm.	46%	As defined by the USDA, this term only refers to how meat is processed after slaughter, not how an animal was raised.
The phrase "USDA Organic" on a package of meat, eggs, or dairy products ensures that the animal had access to the outdoors for most of each day.	46%	According to Organic standards, outdoor access is required but the size, duration and quality of space is not defined for most species.

- 5. Consumers also make incorrect assumptions about common practices regarding farm animal welfare and are concerned when they find out that their assumptions about animal welfare are not true.** Again, in addition to falsely identifying statements as accurate, many reported being unsure about the accuracy of statements (range of 11% to 23% were unsure, depending on the topic).

False Statements	% Who Believe Accurate	True Statements	% Who Are Concerned to Learn the Statements are True
Farms need to meet certain standards to be able to say that the food comes from animals that were treated well.	69%	If meat, eggs, and dairy products have the label "humane," it does not guarantee that the animal had a better than average quality of life on the farm.	75%
There are federal laws that govern how animals raised for food are treated on farms.	56%	There are no federal laws that govern how animals raised for food are treated on farms.	76%
An independent inspector verifies the health and welfare of animals living on most farms.	47%	An independent inspector does not verify the health and welfare of animals living on most farms.	75%
Most farm animals raised for food spend significant time outdoors.	45%	Most farm animals raised for food do not spend any time outdoors.	74%
Most farm animals receive pain control when castration, beak cutting, tail cutting, or other bodily alterations are performed.	35%	Most farm animals do not receive pain control when castration, beak cutting, tail cutting, or other bodily alterations are performed.	73%

6. **Consumers think that there should be a third party checking on the welfare of animals, and they want their stores to carry more welfare certified products.** Seventy-eight percent of consumers think that there should be an objective third party checking on the welfare of animals on farms. Seventy-five percent want their stores to carry a greater variety of welfare certified meat, eggs, and dairy products. **A key point to stores and brands is that consumers want an independent inspector to certify that animals have been treated humanely, and they want their stores to carry products whose label claims have been independently certified.**

7. **Consumers want and would seek out trustworthy welfare certified products from both stores and restaurants. They would do so even when the price increases.** Sixty-seven percent of consumers would purchase these products even when it means a modest increase in price. The majority of consumers would use welfare-certified animal products as a criterion for choosing a restaurant, and a plurality would be willing to pay up to five dollars more per entrée.

In summary, consumers care about the welfare of animals raised for food, and they are paying more and more attention to labels that indicate a higher standard of animal welfare. However, there are many misconceptions about the current standards for animals raised for food and what labels really mean. Consumers care about the treatment of these animals, and they want there to be an objective third party to oversee the animals' welfare. Consumers also want their stores and brands to carry more welfare-certified products, and they would be willing to pay more for those products.

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ⁱ Lake Research Partners designed this online survey of 1,000 American adults who purchase or consume meat, eggs or dairy products, drawn from a national sample of internet users. The survey was fielded April 1-7, 2016. The margin of error for the total sample is +/- 3.1%.